

**REQUEST FOR PROPOSALS**

**BY THE**

**MAYOR AND CITY COUNCIL OF BALTIMORE**

**DEPARTMENT OF PLANNING**

**COMMISSION FOR HISTORICAL & ARCHITECTURAL PRESERVATION**  
**(CHAP)**

**FOR A CONSULTANT WHO WILL BE ENGAGED**

**TO DRAFT AN**

**OPERATING, BUSINESS AND FINANCE PLAN**

**FOR THE**

**EDGAR ALLAN POE HOUSE MUSEUM**  
**203 N. AMITY STREET**  
**BALTIMORE, MARYLAND**

## **I. REQUEST FOR PROPOSALS FOR THE EDGAR ALLAN POE HOUSE MUSEUM TO SELECT A CONSULTANT (THE APPLICANT) WHO WILL BE ENGAGED TO CREATE A VIABLE “OPERATING, BUSINESS AND FINANCE PLAN”**

The Mayor and City Council of Baltimore, a municipal corporation of the State of Maryland, acting through its Department of Planning, Commission for Historical and Architectural Preservation (“CHAP”) is seeking written Proposals from qualified Consultants to prepare an “Operating, Business and Finance Plan” for the **EDGAR ALLAN POE HOUSE MUSEUM**, located at 203 N. Amity Street in Baltimore, Maryland (“Poe House”).

The Poe House is a National Historic Landmark and a Baltimore City local landmark. The hours of operation are Thursday through Saturday, noon to 4:00 P.M. (Telephone: 410-396-7932)

Additional information can be found at [www.eapoe.org/balt/poehse.htm](http://www.eapoe.org/balt/poehse.htm) or <http://www.baltimorecity.gov>, enter Poe House and Museum. The Poe House is owned by the Housing Authority of Baltimore City and leased to the City for the purpose of museum operations by CHAP.

## **II. EDGAR ALLAN POE HOUSE MUSEUM HISTORY**

Poe lived in Baltimore in the 1820’s prior to a brief stint at West Point. He returned to Baltimore in 1832 to live with his aunt Maria Clemm, his grandmother and two cousins at No. 3 Amity Street. The tiny, cramped house was surrounded by open fields and farmland. This was a difficult time for the family with no income and food in short supply.

Yet, despite this dire situation Poe wrote numerous classics in this house during the 1832 to 1835 time period. Among them was *MS Found in a Bottle*, which gained him a monetary prize, *Morella*, *Lionizing* and his first true horror story, *Berenice*. Another important event during this period was the quiet marriage to his cousin Virginia on September 22, 1835.

Poe’s grandmother died in 1835. She was paying the rent through a pension and with her death the pension ceased. Poe moved to Richmond never to return to Baltimore to live. Poe was passing through Baltimore when he died here on October 7, 1849. He is buried in the historic Westminster Graveyard with members of his family. Although his stay in Baltimore was brief it was a momentous experience for him. Due to the popularity and notoriety of his Baltimore stories he decided to continue to write short stories and thus shaping his career and future of the short story. Many people lived in the Poe House since 1835. The last family moved out in 1922.

In the 1930’s the homes in this area of the city were razed for the construction of the first public housing project in the country. Due to the public outcry and the determination of the Edgar Allan Poe Society the Poe house on Amity Street was spared destruction. It opened in 1949 as the Edgar Allan Poe House and Museum under the stewardship of the Poe

Society. The surrounding public housing was named the Poe Homes in honor of Poe. The house itself is owned by the Baltimore City Housing Authority. In 1978 the Poe Society approached the City of Baltimore for support in renovating the historic site which had fallen into disrepair. The society had neither the money nor the membership to continue in its role of caretaker of the site. The City of Baltimore was reluctant to supply the funding for the renovations due to the inability of the Poe Society to properly administer the house. The Society then offered to turn over the administration of the house to the City of Baltimore. Mayor William Donald Schaefer enthusiastically endorsed the idea and the renovations were completed in 1979.

The Poe House and Museum was placed under the jurisdiction of the Commission for Historical and Architectural Preservation. Since 1979 CHAP has provided a highly successful stewardship of the site.

### **III. SUMMARY OF MANAGEMENT AND BUDGET HISTORY:**

From 1949 until 1979 the Edgar Allan Poe Society has maintained the Poe House and Museum. The City of Baltimore has been maintaining the house since 1979 and provided one staff position to implement the site interpretation. In 2009, the Poe House was awarded the highly prestigious Raven Award by the Mystery Writers of America for 30 years of promoting the Poe House and the life and times of Poe. Visitors from around the world continue to visit Baltimore and the Poe House and Poe's grave.

### **IV. PURPOSE OF "OPERATING, BUSINESS AND FINANCE PLAN".**

The Applicant who is considered to be the best qualified by CHAP will enter into a contract with the City to create a practical plan and blueprint to assure financial self-sustainability of the Poe House by July 1, 2012.

A successful Operating, Business and Finance Plan for the Poe House should lay out an operating strategy that protects and enhances the legacy of Poe in Baltimore and the integrity of the Poe House and Museum, while generating sufficient revenues to effectively operate a historic attraction of regional, national and international significance. The business plan should identify and assess a range of potential partnerships that could enhance the long-term sustainability of the Poe House Museum, to the mutual benefit of the partners. Such partners could include universities, libraries, other museums and attractions, etc.

The successful Applicant will present the City with an Operating, Business and Finance Plan including, but not limited to the following:

A. Background information to include a brief survey of historic house museums of comparable scale and significance across the country and discussion of the strengths and

weaknesses of the various operating models and partnerships those attractions employ in order to achieve long-term financial sustainability.

B. Analysis of the current Poe House budget and operations, factoring in the economic value of the Poe House volunteers, with a clear assessment of strengths and weaknesses of the current operation, including the physical condition and attractiveness of the facility, its exhibits and visitor amenities, hours of operation, revenue generating events, etc.

C. Identification and assessment of potential partnerships that could benefit the long-term sustainability of the Poe House Museum, including consideration of area universities and colleges and their programs, other historic sites in the City and region, established major museums, etc. The synergies and benefits of each potential partnership to the Poe House and Museum should be clearly discussed.

D. Proposed management structure(s), including board of directors (if proposed) and proposed museum staffing, specifically that of the museum director/curator.

E. Proposed duties and responsibilities of board (if proposed) and staff to operate the site including: marketing, programming, publicity, developing and managing the budget, hiring practices, purchasing procedures, contracting for services, routine maintenance of landmark and long term preservation.

F. Specific details regarding how funding the landmark's operational and developmental needs will be achieved. The financial plan must include the following: five year operating proforma showing income and itemized expenses; accounting and auditing practices; activity/user/admission fees; specific fund-raising activities; list of potential donors/benefactors; grant application plan (including assignment of grant writing responsibility) and identification of other specific funding sources potentially available to the Poe House.

G. Narrative of the proposed funding model(s) and demonstration that the model(s) have the ability to sustain the Poe Museum at the current funding level or better.

H. Implementation plan to assure that the Poe House is self-sustaining, effective July 1, 2012.

#### **Assumptions Regarding Future Management:**

- I. "Self-sustaining" means, at a minimum, that the current level of Poe House programming and operations is to continue without receiving General funds from the City of Baltimore,
- J. Annual popular Poe House events, including the "Birthday Toast to Poe", currently generate revenue for the Museum. Such events would continue as

important revenue generating traditions that attract local, national and international visitors.

- K. Programming of the Poe Museum could be expanded, contingent upon certainty of an additional sustainable funding stream.
- L. Historically, City general funds have provided for one staff position and a minimal operating budget. A successful “Business and Finance Plan” is expected to demonstrate a sustainable funding stream for (at a minimum) one position and all current operating expenses, plus funding for necessary upgrades to the house, its exhibits and equipment.

## **V. SUBMISSION REQUIREMENTS AND BID GUARANTEES**

All Submissions shall be sent/delivered to the City in a large sealed envelope addressed to:

Commission for Historical & Architectural Preservation (CHAP)  
C/o Baltimore City Board of Estimates  
Office of the Comptroller  
204 City Hall  
100 N. Holliday Street  
Baltimore, Maryland 21202

All submissions shall be in the following form and contain the following information:

### **FORM**

1. Include consultant’s name on face of sealed envelope and proposal title:  
Request for Proposals for Edgar Allan Poe House and Museum
2. One original typewritten proposal
3. Eight (8) copies of typewritten proposal
4. The Proposal must include all documents, materials and information required therein.
5. The original Proposal and eight (8) duplicates must be initialed by the authorized representative of the Respondent.
6. All corrections made on the Proposal must be initialed by the authorized Respondent.
7. All Proposals submitted in response to this RFP must be mailed or hand delivered. No e-mailed or faxed Proposals will be accepted.
8. Proposals or unsolicited amendments to Proposals arriving after the Closing Date and time will not be accepted.

## **CONTENTS**

1. Resume(s) for Team Member(s), including any other Consultants that will be utilized.
2. Description of specific experience with similar projects and/or museums
3. Discussion of Applicant's general approach to the "Operating, Business and Finance Plan".
4. Project Description Narrative addressing §IV of the RFP.
5. Documentation of previous successful experience in preparing business and financial plans for small museums or similar work experience.
6. Any further information that you wish the Evaluation Team to consider.
7. Proposals should not exceed 25 pages total in length.

## **FEE REQUESTED**

Within the large sealed envelope Applicant shall place a smaller sealed envelope marked **FEE REQUEST** in which the Applicant has placed his Fee Requirements for this RFP.

## **VI. BID GUARANTEE CHECK**

**All Proposals shall be accompanied by a check for \$100.00 made payable to the: Mayor and City Council of Baltimore. Any Proposal which does not contain this Bid Guarantee will be immediately returned to the Sender and will not be eligible for review or otherwise considered for selection by the City.**

If the Applicant who is chosen to develop an "Operating, Business and Finance Plan" fails to execute an Agreement with the City within thirty (30) days of selection, the successful Respondent's check shall be deposited by the City as liquidated damages and not as a penalty. (See §XI)

Once the agreement is executed, all Bid Guarantee checks submitted by Respondents shall be returned, except for any checks which may have been forfeited.

## **VII. PRE PROPOSAL MEETING**

A pre-proposal meeting is scheduled for November 10, 2010 at 9:30 A.M. in the Department of Planning, 8<sup>th</sup> Floor; 417 E. Fayette Street, Baltimore, Maryland, 21202

## **VIII. QUESTIONS PRIOR TO SUBMISSION:**

Applicants may submit queries or requests for clarification to:

[plan@baltimorecity.gov](mailto:plan@baltimorecity.gov)

Queries and requests for clarification must be submitted electronically, no later than November 10, 2010 at 12:00 noon. Please state: "Subject of query: Edgar Allan Poe House Museum RFP".

Telephone calls will not be accepted. Posting will appear on the Department of Planning website:

<http://www.baltimorecity.gov/Government/AgenciesDepartments/Planning.aspx>

## **IX. SUBMISSION DEADLINE**

Proposals must be received no later than 11:00 **a.m.**, Eastern Standard Time, on **Wednesday, December 8, 2010** by the Baltimore City Board of Estimates at the Comptroller's Office, Room 204 City Hall, 100 N. Holliday Street, Baltimore, Maryland 21202.. It is the Consultant's responsibility to ensure that the Proposal is delivered by the designated time and date. Proposals which for any reason are not received by the deadline for submission will not be considered and will be returned unopened.

## **X. EVALUATION PROCEDURES:**

### **A. Evaluation Team**

CHAP will convene an Advisory Panel to evaluate the Proposals. The Advisory Panel may include, but will not be limited to the following: Curator of the Edgar Allan Poe House and Museum, Executive Director/Division, Chief of CHAP, Chairman of CHAP, Director of Planning, Director of the Baltimore City Heritage Area, representative of the Department of Finance, members of preservation advocacy organizations, community representatives or other members of CHAP's and the Department of Planning's choosing.

### **B. Evaluation Criteria:**

Proposals shall be evaluated based on, but not limited to, the following criteria:

CHAP will not be limited solely to the information provided by the Applicant, but may utilize other generally available sources of information useful in evaluating the capabilities of the Respondent.

1. The scope, quality, and degree to which the Respondent's Proposal addresses the RFP's goals, intents, and terms of offering.
2. Experience and quality of proposing team.
3. The submitted documentation of previous successful experience with small museum business and finance plan development, specifically the successful implementation.
4. Submission of a strategy and methodology that clearly demonstrates the potential for the Edgar Allan Poe House and Museum will be self-sustaining effective July 1, 2012.
5. Completed plan will be provided to City no later than April 1, 2011.

**C. Interviews:**

Interviews, if required, will be held at the dates and times selected by the Evaluation Team. Applicants will be given due notice of the time selected.

## **XI. POST SELECTION PROCEDURES**

The Applicant providing the Proposal selected by the City shall promptly, and in good faith, negotiate any terms requested by the City and promptly thereafter enter into a formal agreement. Failure to do so within 30 days from selection will cause the City to begin negotiations with the next highest scoring Applicant, who will promptly proceed to enter into a contract with the City.

Failure of any selected Applicant to formalize a contract in good faith with the City will result in forfeiture of the Bid Guarantee which shall be considered as liquidated damages and not as a penalty.

Once the City has formalized an agreement with the Selected Consultant, all Bid Guarantee checks received by the City (that have not been forfeited) will be returned to the party providing the check. In the event that the City has deposited these checks, a check in the same amount will be issued to the party by the Department of Finance.